

State: Arizona

Citation	Condition or Requirement
—	For optional State supplement recipients in section 1902(f) States and SSI criteria States without section 1616 or 1634 agreements--
—	SSI methods only.
N/A —	SSI methods and/or any more liberal methods than SSI described in <u>Supplement 8a to ATTACHMENT 2.6-A</u> .
—	Methods more restrictive and/or more liberal than SSI, except for aged and disabled individuals described in section 1902(m)(1) of the Act. More restrictive methods are described in <u>Supplement 4 to ATTACHMENT 2.6-A</u> and more liberal methods are specified in <u>Supplement 8a to ATTACHMENT 2.6-A</u> .

In determining relative financial responsibility, the agency considers only the income of spouses living in the same household as available to spouses and the income of parents as available to children living with parents until the children become 21.

TN No. 92-1  
Supersedes  
TN No. 87-7

Approval Date AUG 25 1992

Effective Date January 1, 1992

HCFA ID: 7985E

STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: Arizona

ELIGIBILITY CONDITIONS AND REQUIREMENTS

Citation(s)	Condition or Requirement
1902(1)(3)(E) and 1902(r)(2) of the Act	<p>e. <u>Poverty level pregnant women, infants, and children.</u> For pregnant women and infants or children covered under the provisions of sections 1902(a)(10)(A)(i)(IV), (VI), and (VII), and 1902(a)(10)(A)(ii)(IX) of the Act--</p> <p>(1)' The following methods are used in determining countable income:</p> <p><u>X</u> The methods of the State's approved AFDC plan.</p> <p><u>X</u> The methods of the approved title IV-E plan.</p> <p><u>N/A</u> The methods of the approved AFDC State plan and/or any more liberal methods described in <u>Supplement 8a to ATTACHMENT 2.6-A.</u></p> <p><u>N/A</u> The methods of the approved title IV-E plan and/or any more liberal methods described in <u>Supplement 8a to ATTACHMENT 2.6-A.</u></p>

STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: ARIZONA

ELIGIBILITY CONDITIONS AND REQUIREMENTS

Citation(s)	Condition or Requirement
	(2) In determining relative financial responsibility, the agency considers only the income of spouses living in the same household as available to spouses and the income of parents as available to children living with parents until the children become 21.
1902(e)(6) of the Act	(3) The agency continues to treat women eligible under the provisions of section 1902(a)(10) of the Act as eligible, without regard to any changes in income of the family of which she is a member, for the 60-day period after her pregnancy ends and any remaining days in the month in which the 60th day falls.
1905(p)(1), 1902(m)(4), and 1902(r)(2) of the Act	f. <u>Qualified Medicare beneficiaries.</u> In determining countable income for qualified Medicare beneficiaries covered under section 1902(a)(10)(E)(i) of the Act, the following methods are used:  ___ The methods of the SSI program only.  <u>X</u> SSI methods and/or any more liberal methods than SSI described in <u>Supplement 8a to ATTACHMENT 2.6-A.</u>  ___ For institutional couples, the methods specified under section 1611(e)(5) of the Act.

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Citation

Condition or Requirement

If an individual receives a title II benefit, any amounts attributable to the most recent increase in the monthly insurance benefit as a result of a title II COLA is not counted as income during a "transition period" beginning with January, when the title II benefit for December is received, and ending with the last day of the month following the month of publication of the revised annual Federal poverty level.

For individuals with title II income, the revised poverty levels are not effective until the first day of the month following the end of the transition period.

For individuals not receiving title II income, the revised poverty levels are effective no later than the date of publication.

1905(s) of the Act

g. (1) Qualified disabled and working individuals.

In determining countable income for qualified disabled and working individuals covered under 1902(a)(10)(E)(ii) of the Act, the methods of the SSI program are used.

1905(p) of the Act

(2) Specified low-income Medicare beneficiaries.

In determining countable income for specified low-income Medicare beneficiaries covered under 1902(a)(10)(E)(iii) of the Act, the same method as in f. is used.

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TN No. 92-1

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October 1991

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Citation	Condition or Requirement
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1902(u)  
of the Act

(h) COBRA Continuation Beneficiaries

In determining countable income for COBRA continuation beneficiaries, the following disregards are applied:

\_\_\_\_\_ The disregards of the SSI program;

\_\_\_\_\_ The agency uses methodologies for treatment of income more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 4 to Attachment 2.6-A.

NOTE: For COBRA continuation beneficiaries specified at 1902(u)(4), costs incurred from medical care or for any other type of remedial care shall not be taken into account in determining income, except as provided in section 1612(b)(4)(B)(ii).

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STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: ARIZONA

Citation	Condition or Requirement
2.	Medicaid Qualifying Trusts Established on or before August 10, 1993
a.	A "Medicaid qualifying trust" is a trust, or similar legal device, established (other than by will) by an individual (or an individual's spouse) under which the individual (trustor) may be the beneficiary of all or part of the payments from the trust and the distribution of such payments is determined by one or more trustees who are permitted to exercise any discretion with respect to the distribution to the individual. This provision shall apply without regard to whether or not the Medicaid qualifying trust is irrevocable or is established for purposes other than to enable a trustor to qualify for medical assistance under the State Plan or 1115 Waiver and whether or not the trustee's discretion is actually exercised.
b.	For the purposes of Title XIX eligibility, the amounts from a Medicaid qualifying trust deemed available to the trustor is the maximum amount of payments that may be permitted under the terms of the trust to be distributed to the trustor, assuming that the trustee has full exercise of discretion for the distribution of the maximum amount to the trustor.
c.	This provision does not apply to any trust established before April 7, 1986, solely for the benefit of a mentally retarded individual who resides in an intermediate care facility for the mentally retarded.

STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: ARIZONA

Citation	Condition or Requirement
	<p><u>X</u> The Agency does not count the funds in a trust as described above in any instance where the State determines that an undue hardship exists. <u>Supplement 10 of ATTACHMENT 2.6-A</u> specifies what constitutes an undue hardship.</p>
	<p>2A. Trusts established on or after August 11, 1993, other than by will.</p> <p>In determining eligibility for, or the amount of benefits, trusts shall be treated in accordance with Section 1917(d) of the Social Security Act. The term "trust" includes any legal instrument or device that is similar to a trust; an annuity shall be included to the extent that the Secretary of HHS specifies.</p>
	<p><u>X</u> The agency does not count the funds in a trust as described above in any instance where the State determines that an undue hardship exists. <u>Supplement 10 of Attachment 2.6-A</u> specifies what constitutes an undue hardship.</p>
1902(a)(10) of the Act	3. Medically needy income levels (MNILs) are based on family size.
(Not Applicable)	<u>Supplement 1 to ATTACHMENT 2.6-A</u> specifies the MNILs for all covered medically needy groups. If the agency chooses more restrictive levels under section 1902(f) of the Act, <u>Supplement 1</u> so indicates.

State: Arizona

Citation	Condition or Requirement
42 CFR 435.732, 435.831	4. Handling of Excess Income - Spend-down for the Medically Needy in All States and the Categorically Needy in 1902(f) States Only  a. <u>Medically Needy</u>  (1) Income in excess of the MNIL is considered as available for payment of medical care and services. The Medicaid agency measures available income for periods of either ____ or ____ month(s) (not to exceed 6 months) to determine the amount of excess countable income applicable to the cost of medical care and services.  (2) If countable income exceeds the MNIL standard, the agency deducts the following incurred expenses in the following order:  N/A  (a) Health insurance premiums, deductibles and coinsurance charges.  (b) Expenses for necessary medical and remedial care not included in the plan.  (c) Expenses for necessary medical and remedial care included in the plan.  ____ Reasonable limits on amounts of expenses deducted from income under a.(2)(a) and (b) above are listed below.   1902(a)(17) of the Act  Incurred expenses that are subject to payment by a third party are not deducted unless the expenses are subject to payment by a third party that is a publicly funded program (other than Medicaid) of a State or local government.

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Citation	Condition or Requirement
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1903(f)(2) of the Act	a. <u>Medically Needy (Continued)</u>  (3) If countable income exceeds the MNIL standard, the agency deducts spenddown payments made to the State by the individual.

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State/Territory ARIZONA

Citation	Condition or Requirement
<u>Medically Needy (continued)</u>	
1902(a)(17) 435.831(g)(2) 436.831(g)(2)	States are permitted to exclude from incurred medical expenses those bills for services furnished more than three months before a Medicaid Application.
NOT APPLICABLE	<input type="checkbox"/> Yes, the State elects to exclude such expenses.
	<input type="checkbox"/> No, the State does not elect to exclude such expenses.